UShop provides an effective way to submit requisitions, generate purchase orders and apply invoices to generate payments. The assumption, however, is that once a requisition is submitted, it will complete the entire process with minimal deviation from the original request. Buffers are built into the system to allow some flexibility. Instructions below spell out those buffers, or tolerances, and provide methods for handling situations where tolerances are exceeded. Note that these tolerances are intended to facilitate normal exceptions like unanticipated special handling charges, expedited freight and minor approved increases. These tolerances are not to be used for the purchase itself. For example, zero dollar or near zero dollar requisitions will be returned to the requisitioner in order to obtain an estimated dollar amount and proper approvals from the account executive or approved alternate.

Purchase Orders Under $5,000 – The total of all PO lines and the total of all invoices applied never exceed $5,000:

Responsible Party: Accounts Payable (NO Change Order Request is needed)

Accounts Payable will allow each line of a PO to be invoiced over the PO line item amount up to $500.00 (reference chart below). If this applies, no action by the department is needed once the invoice has been submitted for payment. Subcontracts are the exception. Invoices associated with subcontracts cannot exceed the PO by any amount.

Responsible Party: Purchasing Department (Change Order Request is needed)

If the total of all invoices applied to the PO will exceed $5,000 (reference chart below), the buying department will need to contact Purchasing for additional instructions, as additional procurement review and processes may need to be completed before the request can be processed.

Original Purchase Orders Over $5,000 – Change Order Form may be needed:

Responsible Party: Accounts Payable

For PO’s Over $5,000, Accounts Payable will allow each line of a PO to be invoiced over the PO line amount by up to 10% with a maximum of $1,000 per line item (reference chart below). This allows for minor order adjustments, pricing errors or shipping and handling charges without a change order form (Subcontractors excluded). When these conditions apply, Departments should write the PO # on the invoice (and sign it if required by the department) and submit to Accounts Payable for payment. No Change Order Request is needed.

Responsible Party: Purchasing Department

For PO’s Over $5,000, If the total of the invoices applied to any PO line exceed the original amount by more than 10% or $1,000 maximum per line item (reference chart below), the buying department will need to request an increase to the PO with a PO change request form before the additional goods or services can be ordered and/or the invoice paid.
Changes to Chartfield Distributions:

Responsible Party: Purchasing Department  (Do submit Change Order Request)

Chartfield changes initiated **prior** to invoicing can be accommodated **on an exception basis** when a PO change request is submitted.

Responsible Party: Buying Department or Business Unit  (Do Not submit Change Order Request)

Changes to chartfield distributions requested **after** the invoice has been created are rejected. Corrections must be made by the buying department via an e-journal or cost transfer.

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**CHART ORDER REFERENCE CHART**

<table>
<thead>
<tr>
<th>Original Purchase Order Value</th>
<th>Line Item Change Up To $</th>
<th>Revised Purchase Order Total Value</th>
<th>Form Action Needed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $5,000</td>
<td>Up to $500.00 per line item</td>
<td>Less than $5,000</td>
<td>No PO Change Request Form Needed-Submit Invoice to Accounts Payable</td>
</tr>
<tr>
<td>Less than $5,000</td>
<td>Less than $500.00 per line item</td>
<td>Greater than $5,000</td>
<td>Contact Purchasing Department</td>
</tr>
<tr>
<td>Less than $5,000</td>
<td>Greater than $500.00 per line item</td>
<td>Greater than $5,000</td>
<td>Contact Purchasing Department</td>
</tr>
<tr>
<td>Greater than $5,000</td>
<td>Up to 10% and Less than $1,000.00 maximum per line item</td>
<td>Greater than $5,000</td>
<td>No PO Change Request Form Needed-Submit Invoice to Accounts Payable</td>
</tr>
<tr>
<td>Greater than $5,000</td>
<td>Greater than 10% or greater than $1,000 maximum per line item</td>
<td>Greater than $5,000</td>
<td>Change Order Form Needed</td>
</tr>
</tbody>
</table>